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About this Guide

This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the EHR module.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace</strong></td>
<td>Data entered by the user.</td>
</tr>
<tr>
<td><strong>Fonts</strong></td>
<td></td>
</tr>
</tbody>
</table>


Document Icons

This guide also uses the following icons to identify the different document elements:

- **Notes and helpful information.** For example, things that will become apparent later on in the procedure.

- **Important information or steps you must take.** For example, if you do not complete this step you may be unable to complete a task later on.

- **Tips, ideas, and alternative methods.** For example, using shortcuts, applying previously learned tools, or suggesting different uses.

- **Warnings before taking action.** For example, precautions against irreversible actions, or actions that require a lot of work to undo.

- **Challenges and extra steps.** For example, steps that take you beyond the basic procedures.
About EHR

The axiUm Electronic Health Record Module (EHR) is a patient data entry, access, and control system.

Students can use the EHR module to:

• Record a detailed treatment plan before performing treatment.
• Obtain approval for every step of the treatment planning process.
• Attach X-ray images and other electronic forms (e.g. EPR forms) to a patient record.
• Enter self-evaluations.

Faculty members and instructors can use the EHR module to:

• Record treatments performed at their private practice clinic.
• Enter prescriptions for patients.
• Enter evaluations for students where grading is auto-calculated based on values entered.
• Perform all activities that a student can enter, but without the need to authorize every step of the process.

This chapter covers the following topics:

• Opening the EHR module
• About the EHR window

Read the following sections to familiarize yourself with the features of the EHR module.
1 Opening the EHR Module

There are different methods to access the EHR module:

• Icon
• Actions menu
• Desktop

The following instructions describe these methods.

▼To open the EHR module using the icon:

Click Electronic Health Record.

▼To open the EHR module using the Actions menu:

From the Actions menu, click EHR.

▼To open the EHR module using the Desktop:

From the Desktop, click Electronic Health Record.
The next section describes the EHR module window.

2 About the EHR Window

This is how the EHR window may look when you open it for the first time:

You are now ready to begin using the EHR window.
This chapter covers the following topics:

- Adding conditions to the odontogram
- Editing conditions on the odontogram
- Deleting conditions from the odontogram

1 Adding Conditions to the Odontogram

In the following procedure you will complete an odontogram by indicating these findings:

- caries
- restoration

To add conditions to the odontogram:

1. Go to one of the toolbars and click (Create a new Record).

   axiUm displays the Chart Add tab. For information on the Chart Add tab, refer to the axiUm Reference Manual for EHR and see Chart Add Tab on page 87.

2. From the Codes tab, click the Full List tab.

3. Select the Findings option.

4. From the Category list, select Condition.

5. From the Full List tab, select Caries/Decay (our first objective).

   axiUm displays items within the selected heading.
6. Double-click **Incipient Caries**.

![Image of dental structure with caries indicated]

7. On the odontogram, select the tooth's surface to indicate the caries. The selected area is indicated graphically.

8. Click **Add Finding**.

The item is displayed in the list.

![Image of list with caries indicated]

9. From the **Codes** tab, click the **Full List** tab.

10. Select select the **Dental Tx** option.
11. From the Category list, select Restorative.

12. From the Full List tab, select Amalgam Restorations (our second objective), then click 1 surf.

axiUm displays items within the selected heading.

13. On the odontogram, click on the tooth’s surface to where you want to apply the amalgam restoration.

Because we selected a 1-surface amalgam, we only need to select one surface for this example.

The selected area is indicated graphically. In our example, we indicated the amalgam on the caries. If you delete the amalgam, axiUm displays the caries beneath it.

14. Click (Add Planned Tx).
The item is displayed in the list.

<table>
<thead>
<tr>
<th>Code</th>
<th>Site</th>
<th>Surface</th>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>Incipient Caries</td>
</tr>
<tr>
<td>E</td>
<td>0340</td>
<td>11</td>
<td>0</td>
<td>2xodont - 1 surface</td>
</tr>
</tbody>
</table>

You have now finished indicating caries and restorations on the odontogram.

2 Editing Conditions on the Odontogram

There are two situations when you may need to edit the odontogram:

- Immediately after adding the condition.
- After you have closed the EHR module.

In the first case, the Chart Add tab is still open, and therefore you can edit conditions directly from the Chart Add tab.

In the second case, because you have closed the EHR module, the Chart Add tab is no longer displayed when you re-open it. You must delete the condition through the Tx History tab and add a new one.

2.1 Editing Conditions from the Chart Add Tab

In the following procedure, we will use the example we completed in Adding Conditions to the Odontogram on page 1.

To edit conditions from the Chart Add tab:

1. Go to the Chart Add tab.
2. From the list, click on a condition.

For example, click on the Incipient Caries record.
axiUm displays the corresponding Details tab.

3. Make changes to the fields.

For example, change the Site field from 11 to 22.

4. Click (Modify Record).

axiUm updates the information on the list and also on the odontogram.

You have now modified a condition through the Chart Add tab.
2.2 Editing Conditions from the Tx History Tab

To edit conditions from the Tx History tab:

1. Go to the Tx History tab.
2. From the list view, double-click the record you want to edit. For our example, this will be the treatment record for procedure D2140.

axiUm displays the Edit Planned Treatment window. For information on the Edit Planned Treatment window, refer to the axiUm Reference Manual for EHR and see Edit Planned Treatment Window on page 30.
3. Enter the fields and options. For our example, we will change the Site field from 11 to 22.

4. Click OK.

axiUm saves the entries, closes the Edit Planned Treatment window, and returns to the EHR window.

axiUm updates the information on the Tx History tab’s list view and also on the odontogram.

You have now modified a condition from the Tx History tab.

3 Deleting Conditions from the Odontogram

There are two situations when you may need to edit the Odontogram:

- Immediately after adding the condition.
- After you have closed the EHR module

In the first situation, you can delete conditions directly from the Chart Add tab.

In the second situation, you must delete the condition through the Tx History tab.
3.1 Deleting Conditions from the Chart Add Tab

To delete conditions from the Chart Add tab:

1. Go to the **Chart Add** tab.
2. From the list, click on a condition.

   For our example, click on the **Incipient Caries** record.

3. Click ![Delete Record](image)

   axiUm displays the following prompt:

   ![Delete Record Prompt](image)

4. Click **OK**.

   axiUm deletes the items from the list and also from the odontogram.

   ![Caries site deleted](image)

You have now deleted a condition through the Add Chart tab.
3.2 Deleting Conditions from the Tx History Tab

▼To delete conditions from the Tx History tab:

1. Go to the Tx History tab.

2. In the Views list, select the view that includes conditions and materials. For our example, we will click Conditions/Materials.

3. From the list view, select an item.

   For example, click on the Incipient Caries record.

   ![Table Image]

4. Click ![Delete Record](image).  

   axiUm deletes the items from the list view and also from the odontogram.

   axiUm displays the following prompt:

   ![Prompt Image]

5. Click OK.
axiUm deletes the items from the list view and also from the odontogram.

You have now deleted a condition through the Tx History tab.
This chapter covers the following topics:

- Adding treatment plans
- Editing treatment plans
- Deleting treatment plans

1 Adding Treatment Plans

▼ To create a treatment plan:

1. Go to the Tx Plan tab.
2. In the Plans tab, click (Create a new Record).

This selects the Problems tab.

3. Enter something the fields. For our example, we will enter the following:
- **Plan Description:** Reduce discoloration on tooth.
- **The Patient's Chief Concerns:** Discolored tooth.

<table>
<thead>
<tr>
<th>The Patient's Chief Concerns:</th>
<th>Plan Description</th>
<th>Reduce discoloration on tooth</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Problem</th>
<th>Description</th>
<th>Site</th>
<th>Area Found</th>
<th>Problem Type</th>
<th>Status</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

At this time you can update the problem by adding or further defining it.

▶ To update the problem by adding or further defining it at this time:

3.1. Click **Update**.

axiUm displays the Update Problems window. For information on the Update Problems window, refer to the axiUm Reference Manual for EHR and see **Update Problems Window** on page 199.
3.2. Browse to a problem item and double-click on it. For our example, we will select **Discolored Restoration**.

axiUm adds the item to the list.

![Update Problems window](image)

3.3. Click **Close**.

axiUm closes the Update Problems window and displays the updated problem in the Problems tab.

![Updated problem in Problems tab](image)

Updated problem is displayed in the Problems tab.
3.4. If you require approval, click on Approve.

If you require approval, the Approve button is enabled. axiUm displays the User Authentication window.

3.5. A faculty member may be required to authorize the problem.

If you require approval and do not receive it at this time, when you get to the Detailed Plan tab, you may be unable to select treatment options.

4. Click the Diagnosis tab.

The chief concerns and updated problems are automatically displayed in the Problems text box.

5. In the Diagnosis text box, select a diagnosis by clicking Update.
axiUm displays the Select Clinical Diagnosis Codes window. For information on the Select Clinical Diagnosis Codes window, refer to the axiUm Reference Manual for EHR and see Select Clinical Diagnosis Codes Window on page 154.

6. Go to the Category drop-down field and select a category. For our example, we will select Defective Restoration.

7. Click a column heading. For our example, we will click Code.

   axiUm displays the codes associated to the selected category.

8. From the list view, highlight an item. For our example, we will highlight Rest Inadequate Esthetic.

9. Click to select your comment.

   Alternatively, you can double-click on the item.

   ! **Do not click OK or press Enter, this will close the window.**

  💡 *If a diagnosis you want does not exist, enter it in the Free Text field and click* ▪️

10. Click OK to save your selection and close the window.
axiUm displays the diagnosis in the Diagnosis text box.

![Selected Diagnosis](image)

11. Click **OK**.

axiUm saves the selected code, closes the Selected Diagnosis Codes window, and returns to the EHR module.

![Objectives](image)

12. Click the **Objectives** tab.

13. In the **Description** text box, enter the treatment objectives. For our example, we will enter **Improve discoloration on tooth**.

![Description](image)

Enter as many objectives for as many providers or patients.
14. Click **(Add a new Record)**.

axiUm adds the objective to the list.

<table>
<thead>
<tr>
<th>Description</th>
<th>Objective Type</th>
<th>To Plan</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/27/2009</td>
<td>Improve discoloration of teeth</td>
<td>To Plan</td>
<td>DRN</td>
</tr>
</tbody>
</table>

**Objective added to the list.**

*Later you will go back and change the status to indicate if the providers/patients are satisfied with the success of their objectives.*

15. Click the **General Plan** tab.

16. Click **(Create a new Option)**.

axiUm changes the window display.

17. From the **Problems** text box, select a problem. For our example, we will select **Discolored Restoration**.

These are the chief concerns and updated problems we entered earlier.

18. From the **Diagnosis** dialog box, select a diagnosis. For our example, we will select **Rest Inadequate Esthetic**.
These are the items you added in the Diagnosis tab.

19. From the **General Treatment** list, select a treatment. For our example, we will select **REST, Restorative**.

20. Click (Add a new Record).

This moves the selected items into the right-hand list. The estimated cost of the treatment is displayed in this window.

21. Click **Display**.

axiUm displays more details of this treatment.

---

At this time you can add more treatment options.
To add more treatment options at this time:

21.1. Click (Create a new Option).

axiUm changes the window display.

21.2. From the Problems text box, select a problem. For our example, we will select CC - Discolored tooth.

21.3. From the Diagnosis dialog box, select a diagnosis. For our example, we will select Rest Inadequate Esthetic.

These are the items you added in the Diagnosis tab.

21.4. From the General Treatment list, select a treatment. For our example, we will select ADJ, Adjunctive general services.

These are the chief concerns and updated problems we entered earlier.
21.5. Click  (Add a new Record).

This moves the selected items into the right-hand list. The estimated cost of the treatment is displayed in this window.

21.6. Click Display.

axiUm displays more details of this treatment.

21.7. Click Compare.

axiUm displays the Compare Treatment Option window. For information on the Compare Treatment Option window, refer to the axiUm Reference Manual for EHR and see Compare Treatment Options Window on page 16.
21.8. Find the treatment option you want. For our example, we will select 1 of 2 (Restorative).

21.9. Click the associated Approve button.

axiUm displays the User Authentication window.

![User Authentication Window]

21.10. A faculty member may be required to authorize the selected treatment.

21.11. Click Close.

This closes the Compare Treatment Option window and returns to the General Plan tab. axiUm displays the approved treatment item in black.

![Treatment Plan Window]

Approved treatment shown in black.

22. Go to the Detailed Plan tab.

23. Click (Create a new Option).
axiUm changes the window display.

24. Click the Full List tab.

Alternatively, click the Quick List tab.

axiUm changes the options in the Category list.

25. In the Codes tab, select the Dental Txs option.

26. Select from the Category list. For our example, we will select Restorative.

27. Double-click on an item. For our example, we will select D2999, Unspecified restorative proc.
Adding Treatment Plans

This takes you to the Details tab.

28. Complete the fields.

29. Click (Add a new Record).

This moves the selected items to the right-hand list. The estimated cost of the treatment is displayed in this window. If you require approval and the treatment plan has not been approved, axiUm displays the item in blue.

At this time you can create additional treatment options.
To create additional treatment options at this time:

29.1. Click **Display**.

29.2. Click **Create a new Option**.

This displays a new view. Note that the previously selected category (Restorative) is displayed by default.

29.3. Select from the **Category** list. For our example, we will select **Miscellaneous**.

29.4. Double-click on an item. For our example, we will select **D9970, Enamel microabrasion**.

This takes you to the Details tab.
29.5. Complete the fields.

29.6. Click \(\text{Add a new Record}\). This moves the selected items into the right-hand list.

30. Click **Display** to view a more detailed display of this treatment. If you have entered more than one treatment option, you can compare them here.

31. Click \(\text{ }\) and \(\text{ }\) to browse to an option. For our example, we will select option 1 of 2 (or code D2999).

32. Click **Select Option**.
axiUm displays the Approve Treatment Plan window. For information on the Approve Treatment Plan window, refer to the axiUm Reference Manual for EHR and see Approve Treatment Plan Window on page 6.

![Approve Treatment Plan Window](image)

For instructions on receiving approvals for treatment plans, see Receiving Faculty Approval for Treatment Plans on page 44.

33. Go to the Appointment Sch tab.

The treatments that were approved by faculty in the last step are displayed here. The Appointment Schedule tab allows you to create tentative schedules for the procedures.

![Appointment Schedule](image)

This is just an estimated date of completion and not a scheduled appointment.

34. Enter the fields. For our example, select the following:

- Appointment Number: 1
- Estimated Time of Completion - Month: August
- Estimated Time of Completion - Year: 2011

35. Click 📧 (Modify Record).
axiUm saves the entries.

**36. Click on Patient Acceptance tab.**

axiUm displays treatments pending patient acceptance. It also displays treatments already accepted by the patient.

**37. Highlight an item.**

**38. Click on Accept/Print.**

axiUm displays Treatment Plan consent. When you close the document, if you have the electronic signature enabled, the patient can sign an electronic copy using the mouse.

**39. Click (Close).**
axiUm closes the Treatment Plan form and displays the Patient Signature - Treatment Plan consent window. For information on the Patient Signature - Treatment Plan consent window, refer to the axiUm Reference Manual for EHR and see Patient Signature - Treatment Plan Consent Window on page 129.

40. If you have the electronic signature enabled, the patient must sign an electronic copy using a signature pad or the mouse.

41. Click OK.

axiUm saves the signature, closes the Patient Signature - Treatment Plan consent form, and returns to the Patient Acceptance tab.

At this time you can enter notes for the treatment.
To enter notes for the treatment at this time:

41.1. Click **Notes/Recommendations** tab.

41.2. Select from a predefined set of notes by clicking (ellipsis).

axiUm displays the Tx Plan Notes/Recommendations Code window. For information on the Tx Plan Notes/Recommendations Code window, refer to the axiUm Reference Manual for Maintenance and see *Tx Plan Note/Recommendation Codes Window* on page 932.

41.3. Highlight a pre-defined note from the list. For our example, we will select code **D1210**.

If you require additional notes not listed, click (Add a New Record) to add the selected note to the Notes/Recommendations tab.
**41.4. Click ✗ (Close).**

axiUm closes the Tx Plan Notes/Recommendations Code window and returns to the Notes/Recommendations tab.

Selected note is displayed.

**41.5. Click 📋 (Add a new Record).**

axiUm moves the selected item to the list view and saves it to the patient record.

Note is saved in the patient record.

You have now successfully entered a treatment plan.
Go to the EHR module’s Tx History tab. The detail plan is shown here.

2 Editing Treatment Plans

For this example, we will edit the treatment plan we created earlier.

▼To edit a treatment plan:

1. Click on the Tx History tab.

axiUm displays the patient’s treatment history.

2. In the Views list, click on the view that includes planned and in-progress items. For our example, we will click Planned / InProgress.
axiUm displays only the patient’s planned or in-process treatments.

3. Highlight a treatment plan item. For our example, select code D2999.

4. Click (Edit Record).

Alternatively, double-click the item.

axiUm displays the Edit Planned Treatment window. For information on the Edit Planned Treatment window, refer to the axiUm Reference Manual for EHR and see Edit Planned Treatment Window on page 30.

5. Make changes to the fields and options as necessary. For our example, we will select the following:

- Discipline drop-down field: REST, Restorative
- Phase: 1
6. Click **OK**.

axiUm updates the changes. If you require approval, the item changes to blue. The patient indicator also turns blue.

For instruction on receiving faculty approvals, see *Receiving Faculty Approval for Editing Treatments Plans* on page 46.

You have now successfully edited a treatment plan.

### 3 Deleting Treatment Plans

For this example, we will delete the treatment plan we created and edited earlier.
To delete a treatment plan:

1. Click on the **Tx History** tab.

   axiUm displays the patient’s treatment history.

2. In the **Views** list, click on the view that includes planned and in-progress items. For our example, we will click **Planned / InProgress**.

   axiUm displays only the patient’s planned or in-process treatments.

3. Highlight a treatment plan item. For our example, select code **D2999**.

4. Click **(Delete Record)**.

   axiUm displays a message box.

5. Click **Yes**.
axiUm deletes the item from the list view.

If you configure your station options to show deleted lines, axiUm displays deleted items in gray.

You may require faculty approval for deleting a treatment plan. For instruction on receiving faculty approvals, see Receiving Faculty Approval for Deleting Treatment Plans on page 46.

You have now successfully deleted a treatment plan.
This chapter covers the following topics:

- About treatment history
- Selecting procedures

1 About Treatment History

1.1 About the Tx History Tab

The Tx History tab of the EHR lists clinical information for a patient’s chart.

Sorting Information

Information can be sorted by clicking on any of the column headers. For example, you can sort by code by clicking on the Code column heading.

Information can be sorted by selecting any of the views listed in the Views list. For example, to display only planned or in-process items, select the Planned/In Process option.

To search for items based on site or date range, click the (ellipsis) buttons and enter the search criteria.
Distinguishing Colors

<table>
<thead>
<tr>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black</td>
<td>Approved treatment and / or approved clinical notes. Treatment and / or clinical notes that have been deleted by axiUm are crossed out (shown as strikeouts). Treatment and / or clinical notes that have been deleted by the user by clicking Delete are shown with no strikeouts and are light gray.</td>
</tr>
<tr>
<td>Blue</td>
<td>Un-approved treatment and / or un-approved clinical notes.</td>
</tr>
<tr>
<td>Green</td>
<td>Appointment or recall information line</td>
</tr>
</tbody>
</table>

Defining the Status Column

The following defines the different status types that can be attached to an item in the Tx History tab.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P*</td>
<td>Re-activated planned treatments that were previously inactive.</td>
</tr>
<tr>
<td>P</td>
<td>Planned</td>
</tr>
<tr>
<td>I</td>
<td>In-Process</td>
</tr>
<tr>
<td>C</td>
<td>Completed</td>
</tr>
<tr>
<td>A</td>
<td>Condition (finding)</td>
</tr>
<tr>
<td>E</td>
<td>Pre-existing treatment (material)</td>
</tr>
<tr>
<td>V</td>
<td>Ortho visit</td>
</tr>
<tr>
<td>S</td>
<td>A suspended treatment</td>
</tr>
</tbody>
</table>

2 Selecting Procedures

This section describes how to select a procedure.
To select a procedure:

1. Go to **Tx History** tab.

   axiUm displays the patient’s treatment history.

![Image](image1.png)

2. In the **Views** list, click on the view that includes planned items. For our example, we will click **Planned**.

   This displays all planned treatments for this patient.

![Image](image2.png)

3. From the list view, double-click on a planned treatment.
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axiUm displays the Edit Planned Treatment window.

4. In the Provider field, select the provider to perform the treatment.
5. Click OK.

This saves the changes and closes the Edit Planned Treatment window.

You have now selected a procedure for a provider.
This chapter covers the following topics:

- About faculty approvals
- Receiving faculty approval for conditions
- Receiving faculty approval for treatment plans
- Receiving faculty approval at start of procedure
- Receiving faculty approval for changing procedure statuses
- Receiving faculty approval on SOAP notes

1 About Faculty Approvals

Certain actions may require a faculty member’s pre-approval. This faculty sign-off requirement can be set up in the Maintenance module.

This chapter covers faculty sign-off procedures for various actions.

2 Receiving Faculty Approval for Conditions

When adding/editing/deleting a condition, you may require a faculty member's approval.

2.1 Receiving Faculty Approval for Adding Conditions

Before you do the next procedure, make sure you have added a condition. For instructions on adding a condition, see *Adding Conditions to the Odontogram* on page 1.
▼To receive faculty approval for adding conditions:

1. Click on the patient indicator.

axiUm displays the Patient Approvals window.

2. Highlight an item from the list view. For our example, we will select code C3001.

3. Click Approve.

axiUm displays the User Authentication window.

4. A faculty member must authorize this treatment.
Receiving Faculty Approval for Conditions

The item in the Tx History tab is black. Also the patient indicator is now grey.

You have now received faculty approval for editing a condition.

2.2 Receiving Faculty Approval for Editing Conditions

Before you do the next procedure, make sure you have indicated your findings and have the faculty initially approve it. For instructions on adding a condition, see Adding Conditions to the Odontogram on page 1.

▼To receive faculty approval for editing conditions:

Follow instructions for receiving faculty approval for adding conditions. For instructions, see Receiving Faculty Approval for Adding Conditions on page 41.

2.3 Receiving Faculty Approval for Deleting Conditions

Before you do the next procedure, make sure you have indicated your findings and have the faculty initially approve it. For instructions on adding a condition, see Adding Conditions to the Odontogram on page 1. If a provider requires faculty approval for deleting conditions, axiUm displays the User Authentication window.
To receive faculty approval for deleting a condition:

In the User Authentication window, authorize the deletion of this condition.

The item in the Tx History tab is black. Also the patient indicator is now grey.

You have now received faculty approval for deleting a condition.

3 Receiving Faculty Approval for Treatment Plans

When adding, editing, or deleting a treatment plan, you may require a faculty member's approval to complete the action.

3.1 Receiving Faculty Approval for Adding Treatment Plans

Before you do the next procedure, make sure you have added a treatment plan. For instructions on adding a treatment plan, see Adding Treatment Plans on page 11.

To receive faculty approval for adding treatment plans:

1. In the Approve Treatment Plan window, select a treatment.

2. Click Approve.
Receiving Faculty Approval for Treatment Plans

axiUm displays the User Authentication window.

3. A faculty member must authorize this treatment.

axiUm returns to the Approve Treatment Plan window. It displays the approving faculty member’s name and approval date. The Approve button is now grey.

4. Click Close.

This closes the Approve Treatment Plan window. axiUm returns to the Tx Plan tab. The approved item that was blue is now black.
You have now successfully approved a new treatment plan for a provider.

3.2 Receiving Faculty Approval for Editing Treatments Plans

Before you do the next procedure, make sure you have created a treatment plan, have the patient approve it, and the faculty initially approve it. For instructions on adding a treatment plan, see Editing Treatment Plans on page 31.

▼To receive faculty approval for editing treatment Plans:

Follow the instructions on receiving faculty approval for adding conditions. For instructions, see Receiving Faculty Approval for Adding Conditions on page 41.

3.3 Receiving Faculty Approval for Deleting Treatment Plans

Before you do the next procedure, make sure you have created a treatment plan, have the patient approve it, and the faculty approve it. For instructions on deleting a treatment plan, see Deleting Treatment Plans on page 33. Complete all the steps in that process.

▼To receive faculty approval for deleting a treatment plans:

In the User Authentication window, authorize this treatment.

The item in the Tx History tab is black. Also the patient indicator is now grey.

You have now received faculty approval for a deleted treatment.

4 Receiving Faculty Approval at Start of Procedure

A faculty member can use the Start Check feature to pre-approve the treatment before a student performs the treatment on the patient. For the following procedure, make sure that the student has Start Check option enabled.

When the provider logs into their system, the provider indicator at the bottom left corner of their screen turns red to indicate that the treatment requires a Start Check.

⚠️ When the patient checks in, make sure they are indicated as Patient Checked In. You can do this from the Rolodex module or the Scheduler module.
To receive faculty approval for changing procedure statuses:

When you change a procedure from one phase to the next, you may be required to obtain faculty approval. This section explains how to obtain approval for changing procedures to In-Process and Complete.

To receive faculty approval for in-process or completed procedures:

Follow instructions for receiving faculty approval for adding conditions. For instructions, see Receiving Faculty Approval for Adding Conditions on page 41.

6 Receiving Faculty Approval on SOAP Notes

If a provider requires approval for SOAP note entries, a faculty member must approve them.

To approve a SOAP Note:

Follow instructions for receiving faculty approval for adding conditions. For instructions, see Receiving Faculty Approval for Adding Conditions on page 41.

axiUm displays the Approve SOAP Note window so you can review the SOAP note details. When you approve it, axiUm closes the Approve SOAP Note window.

You have now received faculty approval for the SOAP note. In the Tx History tab, the SOAP note is displayed in black. Also the patient indicator is now grey.
This section discusses the use of SOAP (Subjective, Objective, Assessment, and Planned) Notes to attach to a treatment plan.

1 Adding SOAP Notes

You can add SOAP notes to the following tabs in the EHR module:

- In Progress
- Tx History
- Chart Add

For our example, we will add SOAP notes (for generic use) to an item in the Tx History tab.

▼To add a SOAP Note:

1. Go to the Tx History tab.
2. Click on (Add a New Note).
   
   axiUm opens the Select Note Type window.

   ![Select Note Type Window]

3. Select the SOAP Note option.
4. Click OK.
axiUm displays the SOAP Note window. For information on the SOAP Note window, refer to the axiUm Reference Manual for EHR and see SOAP Note Window on page 168.

5. Go to the Subjective text box.

6. Click on the Code field (ellipsis).
axiUm opens the **Select Clinical Note Codes** window.

7. Browse to an item and highlight it. For our example, we will select **Inflammation**.

8. Click **OK**.
axiUm moves the item to the list view.

9. Click **OK**.

axiUm closes the Select Clinical Note Codes window and returns to the SOAP Note window.
The selected subjective note is displayed in the Subjective text box. You can add additional notes by entering it in the text box.

**10.** Repeat steps 5-8 for the **Objective**, **Assessment**, and **Planned** text boxes. For our example, we will select the following:

- **Objective:** Heavy plaque
- **Assessment:** Localized periodontal disease
- **Planned:** Restoration

**11.** Click OK.
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axiUm closes the SOAP Note window. The item in the Tx History tab now displays a note indicator to show that there are notes on this patient record.

If the item is blue, you require a faculty to approve them. For instructions on receiving faculty approval on SOAP notes, see Receiving Faculty Approval on SOAP Notes on page 47.

You have now successfully created SOAP notes for the patient record.

▼To find SOAP notes in the Tx History tab:

In the Views list, click on the view that includes notes. For our example, we will click Notes.

This displays all treatment notes for this patient.
The Evaluations module is a tool that instructors will use for grading purposes. A clinical manager will use to ensure the instructors are completing the grading assessments.

1 Evaluating Students

There are two types of evaluations:

- **Sessional** - Graded immediately, graded on the clinic floor, immediately after treatment. The student is graded based on dental knowledge and hands-on skills.

- **Periodic** - Graded after a number of approved treatments are completed. axiUm collects all treatments performed within the date range. The student is graded based on general performance (e.g. professionalism).

This section will discuss sessional evaluations.

For a faculty member to perform a sessional evaluation:

- You must be approving either an in-progress or completed treatment
- You must be set up for sessional grading
- The procedure requires grading

Make sure the provider is set up to require sessional evaluations after completing treatments.

When a provider completes the treatment, the patient sign the approval form. Both patient and provider waits for a faculty member to evaluate the treatment completed on the patient.
member then evaluates the student by completing an evaluation form.

▼ To evaluate a student using sessional:

1. Go to the **Add/Edit Evaluations** window.

   After the patient signs the Evaluation form, axiUm automatically displays this window.

   ![Add/Edit Evaluation Window](image)

   2. From the **Form** drop-down field, select an evaluation form. For our example, we will select **DCA, Daily Clinical Evaluation**.
axiUm displays the associated evaluation items in the Questions column.

3. From the **Question** column, click an evaluation item.

   This enables the associated grade field in the Grade column.

4. Enter a grade in the associated grade field under the **Grade** column.

   **At this time, you can enter a comments for each grade.**
To enter a comments for each grade at this time:

4.1. Double-click on a comment. For our example, we will select **Technical Competence**.

axiUm displays the Evaluation Comments for a specific grade window.

4.2. In the Comments text box, enter your comments. For our example, we will enter **Very good**.

4.3. Click **OK**.

It closes the window and returns to the Add/Edit Evaluation window.

axiUm displays the comments below the evaluation item.
5. Click OK.

When required answers are left incomplete, axiUm displays these items in red. Holding the evaluation for later completion allows you to leave these required answers incomplete.

axiUm saves the entered grades, closes the Add/Edit Evaluation window, and displays a message box:

6. Click No. For our example, we will not print grade cards.

You have now successfully graded a student using sessional evaluation.